PROJECT EARN MEETING OUTLINE:

2/7/07

Marketing and Recruitment

Screening and Random Assignment

- Incentive Cards if not selected
- "Now What" new client packet (if selected) – services of Project EARN, Advancement & Motivation worksheet, EITC & tax prep info., Employer Info. Form, next steps, appointment set

First Meeting
Script

- Greeting & small talk & ask how much time client has
- Purpose of Project EARN – increase your income and improve your job situation
- First – you will choose what advancement goals you want to focus on
- Second – we will discuss your current job
- Third – we will consider ways to improve your income right away: food assistance, medical coverage, child care funds, tax credits

Ask "Okay?"

- Orientation Binder – what Project EARN offers (go through binder; ask questions, as appropriate)
- "Advancement Goals/My Motivation" worksheet - discuss
- IIAP and Jodie's question pages – ask the Jodie questions that correspond with client's top goal. Identify 1 or 2 long term goals (up to 2 years to complete); identify 1-3 **advancement** action steps; write goals and steps with due dates on paper IIAP; give copy to client. Complete both form 1 & form 2 of IIAP.
- Introduce work supports – Check to see if client is currently receiving FS or MediCal. Explain that at next meeting you will use the Income Calculator to see what financial supports can improve income right away (offer the "What to bring back list" to speed the process for FS, MediCal, Childcare)
- EITC – Find out if client has files taxes yet; gather info. on refund received/expected; provide tax prep site info., if appropriate
- Do you have questions for me?
- Gather and Confirm contact info., alternate contacts, permission to contact at work
- Establish date for next meeting and what will be done at next meeting
- Review IIAP - who will do what by when; explain how each action step relates to client's motivation
- Reinforce – this is the beginning
- Give copy of IIAP, appointment card, incentive cards
- Enter forms and case notes in CISRS - include action steps (Plan: 1., 2., 3.) in 1-on-1 coaching note

Call client to remind of appointment

(over) →

2/7/07

PROJECT EARN MEETING OUTLINE, page 2:

Second Meeting:

a. Review progress on action steps -congratulate client on steps done; problem solve, if necessary
b. Revisit message of advancement and client's motivation
c. Income Calculator, part one (supports)
d. If appropriate, begin All-In-One work supports application & required docs
e. Income Stabilization form – complete form
f. Income Calculator, part two (advancement income)
g. Update client's Plan; outline next action steps - who will do what prior to next meeting; explain how each action step relates to client's motivation; give client copy of steps agreed on
h. Update contact info. if necessary
i. Establish date for next meeting – give client appt. card
j. Discuss what will happen at next meeting
k. Give copy of action steps client has agreed to do
l. Provide supportive service, if appropriate
m. Enter case notes in CISRS

Call customer to remind of appointment

Third Meeting:

a. Review progress on action steps - congratulate client on steps done; problem solve, if necessary
b. Revisit message of advancement
c. Finalize work supports - link the value of the benefit package to the customer's motivation and goal of increasing income
d. Update client's Plan; outline next action steps - who will do what prior to next meeting; explain how each action step relates to client's motivation; give client copy of steps agreed on
e. Establish date of next meeting– give client appt. card
f. Discuss what will happen at next meeting or phone contact
g. Give update copy of action steps
h. Enter case notes in CISRS